

Application of Controls and Lockout/Tagout Devices

The established procedure of applying energy controls includes the specific elements and actions that must be implemented in sequence.(3) These are briefly identified as follows:

1. Prepare for shut down,
2. Shut down the machine or equipment,
3. Disconnect the energy isolating device,
4. Apply the lockout or tagout device,
5. Render safe all stored or residual energy, and
6. Verify the isolation and deenergization of the machine or equipment.

Removal of Locks and Tags

Before lockout or tagout devices are removed and energy is restored to the machine or equipment, the authorized employee(s) must take the following actions or observe the following procedures:

1. Inspect the work area to ensure that non-essential items have been removed and that machine or equipment components are intact and capable of operating properly;
2. Check the area around the machine or equipment to ensure that all employees have been safely positioned or removed;
3. Make sure that locks or tags are removed **only** by those employees who attached them. (In the very few instances when this is not possible, the device may be removed under the direction of the employer provided that he or she strictly adheres to the specific procedures outlined in the standard); and
4. Notify affected employees after removing locks or tags and before starting equipment or machines.

Additional Safety Requirements

Special circumstances exist when 1. machines need to be tested or repositioned during servicing, 2. outside (contractor) personnel are at the worksite, 3. servicing or maintenance is performed by a group (rather than one specific person), and 4. shifts or personnel changes occur during servicing or maintenance.

- **Testing or positioning of machines.** OSHA allows the temporary removal of locks or tags and the re-energization of the machine or equipment only when necessary under special conditions—for example, when power is needed for the testing or positioning of machines, equipment or components. The reenergization must be conducted in accordance with the sequence of the following steps:
 1. Clear the machines or equipment of tools and materials,
 2. Remove employees from the machines or equipment area,
 3. Remove the lockout or tagout devices as specified,
 4. Energize and proceed with testing or positioning, and
 5. De-energize all systems, isolate the machine or equipment from the energy source, and reapply lockout or tagout devices as specified.
- **Outside personnel (contractors).** The onsite employer and the outside employer must inform each other of their respective lockout or tagout procedures. Each employer must ensure that its personnel understand and comply with all restrictions and/or prohibitions of the other employer's energy control program.
- **Group lockout or tagout.** When servicing or maintenance is performed by a crew, craft, department or other group, they must utilize a procedure that affords the employees a level of protection equivalent to that provided by the implementation of a personal lockout or tagout device.